



Request Form System User's Manual

Contents

Contents

- Introduction 3
- Authorization Basics 3
- Home Page 3
- Creating Requests 5
- Deleting Requests 5
- My Requests Inbox..... 5
- My Requests 6
- My Requests Profiles 7
- Requests Search..... 8
- View Requests Profiles..... 9
- Upload Requests Profiles..... 10
- Assign 11
- Attachments..... 13
- Copy 14
- Decline 14
- Finalize..... 15
- History 17
- View Only 17
- Setting Up and Maintaining Groups 18
- Training, Help, and Support 18

Introduction

The Request Form System allows University of Texas at Austin employees to make requests within the department by filling out an online request form.

Request Form System home page:

<https://utdirect.utexas.edu/apps/services/requests/>

This request form can then be assigned to a departmental administrator who can use the information provided to take the next step(s) in processing the request. For certain types of requests, this will result in the creation of an electronic document, in other cases it will generate and email notification to a particular department to request further action.

Authorization Basics

Any university employee can access the Request Form System to view existing requests or create new ones.

Any university employee who is assigned to a desk that is linked to an authorization view with command authorization view status can perform the following actions: search for or view existing forms.

In addition to the previous actions, any university employee who is assigned to a desk that is linked to an authorization view with command authorization update status can perform the following actions: create, update, delete, reassign, decline, or finalize.

Home Page

The **Requests Home** page is the starting point from which any university employee can view existing requests, create new ones, update requests assigned to the user or a group to which the user belongs.

In addition to the following features, the home page and every other page in the Request Form System includes a link to system **help** in the upper right-hand corner.

THE UNIVERSITY OF TEXAS AT AUSTIN

UT DIRECT

UT DIRECT QUAL

NAVIGATION MENU

Request Forms

[Home](#)
[My Inbox](#)
[My Requests](#)
[My Profiles](#)

Administrative Tools

[Search](#)
[View Profiles](#)
[Upload Profiles](#)
[View Reports](#)

askUS

My BookmarksMy FinancesMy JobMy 40 AcresUT Direct HelpLogoff

UT DIRECT >> ADMINISTRATIVE APPLICATIONS >> REQUEST FORMS

help | bookmark

Requests Home

REQUEST LOOKUP

Request ID: [Go](#)

START A NEW REQUEST

[Travel Authorization Request](#)
[Purchase Request](#)

MY REQUESTS INBOX

Request ID	Description	Request Type	Creator
REQ99994V	fdsafdsa	Travel Authorization Request	Sean D White (whitesd)
REQ99994T	fdsafdsa	Travel Authorization Request	Sean D White (whitesd)
REQ99996K	test req-430	Purchase Request	Diana E Urban (deu64)
REQ99998M	testing assignment notes	Travel Authorization Request	Eric A Petersen (eap988)
REQ99996M		Purchase Request	Sean D White (whitesd)

Not displaying all requests; see all 7 in [My Requests Inbox](#).

MY REQUESTS

Request ID	Description	Request Type	Status
REQ99996M		Purchase Request	Created

Navigation Menu

The navigation menu on the left hand side contains links to the other pages in the Request Form System: **My Inbox**, **My Requests**, **My Profiles** as well as Administrative Tools (available to authorized users): **Search**, **View Profiles**, **Upload Profiles**, **View Reports**.

Request Lookup

If the user knows the Request ID it can be typed into the **Request Lookup** field taking the user directly to a specific form.

Start a New Request

If the user wished to create a new request form, the **Start a New Request** section is where to begin.

My Request Inbox

The **My Requests Inbox** widget on the home page will display the first five requests in the user's **Requests Inbox**. The user's inbox contains requests awaiting some action on the user's part.

My Requests

The **My Requests** widget on the home page will display the first five requests on the user's **My Requests** page. The user's requests page contain requests created by or on behalf of the user.

Creating Requests

1. To begin creating a new request, select the type of request in the **Start a New Request** section on the home page and click **Start**
2. Scroll through the form and enter information as needed into the appropriate fields
3. Click **Continue**

Deleting Requests

Requests can only be deleted by the request creator before the request has been assigned.

To delete a newly created request, select **Delete** from the **Advanced Options** drop-down menu.

Once the request is deleted, no further changes are allowed.

My Requests Inbox


The **My Requests Inbox** displays details of any request forms awaiting some action on the part of the user (e.g., which were created and not yet assigned or which have been assigned to the user or to a group to which the user belongs).

UT DIRECT >> ADMINISTRATIVE APPLICATIONS >> REQUEST FORMS

help | bookmark

My Requests Inbox

Request ID	Request Type	Description	Status	Assigned to UT EID/Group	Assigned	Requester UT EID	Created
[Hide Filters] [Clear Filters]							
REQ99973D	Travel Authorization Request	16	In Progress	FAUX1 Group for testing (FAUX1)	04/12/2013	Sarah Greening (sng343)	04/12/2013
REQ99975D	Travel Authorization Request	Test ID A-10	In Progress	FAUX1 Group for testing (FAUX1)	04/10/2013	Tracy DeMont (demontrt)	04/10/2013

- By default, requests will be sorted by the date assigned
- To sort by a different value, click any of the column header links
- The arrow symbol  appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
- To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
- To hide the filter options, click **Hide Filters**
- To reset filters to the original values, click **Clear Filters**

REQ999924	Travel Authorization Request	test trip to Madrid	In Progress	FAUX1 Group for testing (FAUX1)	03/21/2013	Sean D White (whitesd)	03/21/2013
REQ99998R	Travel Authorization Request	test trip to Madrid	In Progress	FAUX1 Group for testing (FAUX1)	03/20/2013	Gary E Martt (gem)	03/20/2013

Requests per page: 20 


Page 1 of 2
[Previous](#) [Next](#)

Comments to: [askUS](#) |

- By default, the first 20 requests will be listed. To view more requests on a single page, choose a larger value from the **Requests per page** drop-down menu
- If there are multiple pages of requests, click **Previous** or **Next** to page through the results

My Requests

The **My Requests** page displays details of any request forms created by the user or which were create on the user's behalf.

- By default, requests will be sorted by status
- To sort by a different value, click any of the column header links
- Arrow symbol  appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
- To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
- To hide the filter options, click **Hide Filters**
- To reset filters to the original values, click **Clear Filters**
- By default, the first 20 requests will be listed. To view more requests on a single page, choose a larger value from the **Requests per page** drop-down menu
- If there are multiple pages of requests, click **Previous** or **Next** to page through the results

My Requests Profiles

The **My Requests Profiles** page allows users to pre-select people or groups to which forms will be assigned in the future. Once saved, profiled assignees can make assigning forms simpler and easier.

To profile an assignee:

1. Select a specific request type from the drop-down menu
2. Check **UT EID** or **Group**
3. Type in or search for the UT EID of the assignee or type in or search for the group name
4. Click **Add to Profile**

To make the UT EID or group the default assignee, check **Make Default** before clicking **Add to Profile**. Making an individual or group the default means that forms will automatically be assigned to the person or group selected.

Once a default assignee or group is chosen, to select a different assignee or group, click **Make Default** on the **Default Profile** column. The page automatically refreshes showing the updated information.

UT DIRECT >> ADMINISTRATIVE APPLICATIONS >> REQUEST FORMS
[help](#) | [bookmark](#)

My Requests Profiles

Select form
Travel Authorization Request

Type	ID	Description	Delete	Default Profile
UT EID	gem	Gary E Martt (gem)	X	Default
Group	FAUX1	FAUX1 Group for testing (FAUX1)	X	Make Default

Add to Profiled Assignees

☐ UT EID
☐ Group

Add to Profile

To remove an assignee or group from the default list, click **X** in the **Delete** column. The page automatically refreshes showing the updated information.

Requests Search

Not all users will see the **Search** link in the **Navigation Menu** nor will all users be authorized to access the **Search** page.

Authorizations


Access to the request form search page is limited to university employees who are assigned to a desk that is linked to an authorization view with command authorization view status for the command or electronic document in question.

UT DIRECT >> ADMINISTRATIVE APPLICATIONS >> REQUEST FORMS

Requests Search

Search by for

To search for request forms:

1. Select a specific request type from the **Search** drop-down menu
 2. Select a search criteria from the **by** drop-down menu
 3. Type a search value in the **for** field
 4. Click **Search**
- By default, search results will be sorted by Request ID
 - To sort by a different value, click any of the column header links
 - Arrow symbol  appears next to the selected column header indicating how results are being sorted (e.g., ascending or descending order)
 - To filter requests, type a keyword into any of the text boxes below the column headers or select a value from one of the available drop-down menus
 - To hide the filter options, click **Hide Filters**
 - To reset filters to the original values, click **Clear Filters**
 - By default, the first 20 requests will be listed. To view more requests on a single page, choose a larger value from the **Requests per page** drop-down menu
 - If there are multiple pages of requests, click **Previous** or **Next** to page through the results

View Requests Profiles

Not all users will see the **View Profiles** link in the **Navigation Menu** nor will all users be authorized to access the **View Profiles** page.

Users who are authorized can view the profiled assignees for anyone.

View Requests Profiles

Select a form

Enter Profilee UT EID

To view an individual's profiled assignees:

1. Click the **Select a form** drop-down menu, and select the appropriate form.
2. In the Enter Profilee UT EID field, type the individual's UT EID.

Upload Requests Profiles

Not all users will see the **Upload Profiles** link in the **Navigation Menu** nor will all users be authorized to access the **Upload Profiles** page.

Users who are authorized can upload a spreadsheet of profiled assignees on behalf of the staff and faculty in their department.

Upload Requests Profiles help | bookmark

Upload Requests Profiles

This page allows users to add profiled assignees for various forms. Forms can be assigned to individuals or groups.

- Profile assignees for one or many users by uploading a profile spreadsheet.
 - To look up group codes when completing the spreadsheet, use the [Group Lookup](#).
 - For more information about groups, refer to [Group Setup and Maintenance](#).
- Use the [profile spreadsheet template](#).

Select File:

To upload a spreadsheet of profiled assignees:

1. Use the **Profile Upload Spreadsheet** template to prepare for the upload.

- a. Click **profile spreadsheet template** and open the file with Microsoft Excel.
 - b. In column A, enter the UT EIDs of the profilees.
 - c. In column B, enter the title of the appropriate form, as listed in the column header instructions.
 - d. In column C, type the UT EID or group code to which the profilee's forms should be assigned.
 - e. In column D, type an X if the assignee in column C is the default assignee for the profile.
 - f. Save the spreadsheet so it can be uploaded.
2. On the **Upload Requests Profiles** page, click **Browse**, and select the appropriate file.
3. Click **Upload**.
4. Review the information displayed on the screen. If there are any error messages, resolve the errors and upload the spreadsheet again. Warning messages are for informational purposes only and do not require action. When all the information is accurate, click **Save**.

Assign

Once a request form is created it can be assigned to one or more people or groups depending on the department's ad hoc assignment process.

Whenever additional information or further action is required on a request, it should be assigned according to departmental assignment rules.

Assigning a request to a person or group **IS NOT** the same as approving an electronic document and routing it forward as in *DEFINE or on UT Direct.

A request can be assigned in one of two ways:

1. Click **Continue** at the top of the request form
2. Click the **Assign** tab at the top of the request form page

Either of the two above methods will take the user to the **Request: Assign** page. Once there, if a default assignee has been selected, the name and UT EID or group name of the assignee will automatically be displayed in the **Assign to** field.

Request History **Assign** Finalize

** Indicates a required field.*

Choose Assignee ?

* Assign to Martt, Gary E (gem) ▼

Assignment Note

Assign

1. To select a different assignee, select **UT EID** or **Group** from the drop-down menu
2. Type in or search for the UT EID of the assignee or type in or search for the group name
3. To add the assignee to the user's profile, check **Add to Profile**
4. To make the assignee the default, check **Make Default**
5. Any **Assignment Notes** entered will appear in the notification email sent to the assignee
6. Click **Assign**

Assigned To	Tracy DeMont (demonctl)	Created By	Sean D White (whitesd)
Assigned On	April 22, 2013, 4:49 p.m.	Created On	April 22, 2013, 11:58 a.m.
Request ID	REQ9997Z9	Last Updated By	Sean D White (whitesd)
Request Type	Travel Authorization Request Form	Last Updated On	April 22, 2013, 4:49 p.m.
Status	In Progress		
Requester	Sean D White (whitesd)		
Description	trip to Bermuda		
Request Notes			

Assign to Me

Traveler Information

Traveler Sean D White (whitesd)

Traveler's Contact Information

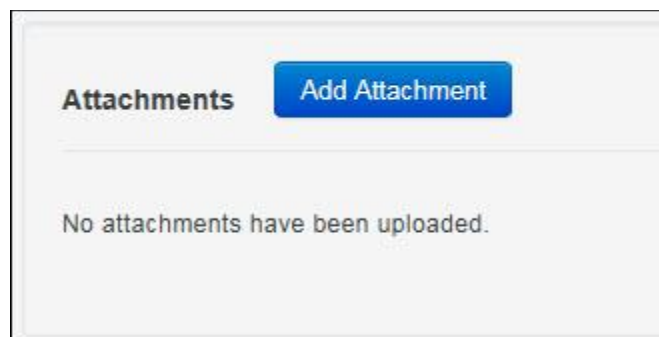
Faculty Travel Grant No

If the request has been assigned to a group, clicking the **Assign to Me** button will allow an individual administrator to take further action on the request such as updating, declining, or finalizing the request.

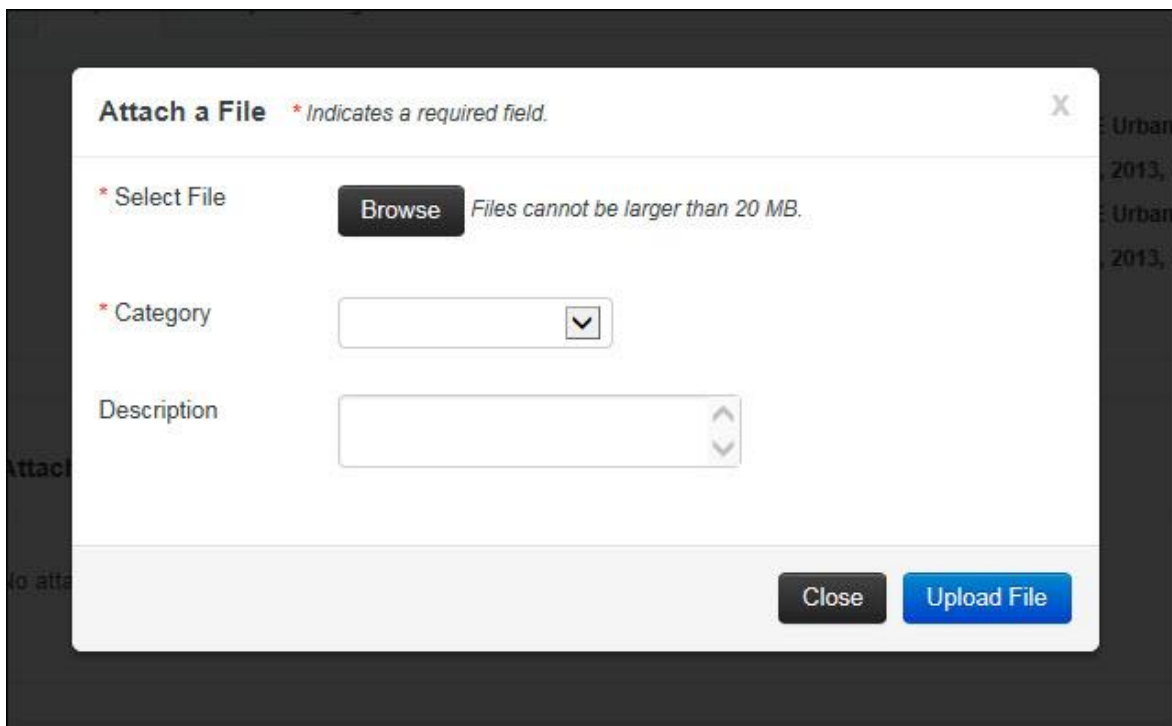
Note: At this time, there is no **recall** action for requests as in *DEFINE or UT Direct. If a user wishes to make changes to a request he or she has already assigned to another person or group, the user will have to contact the assignee to request that it be assigned back to the user. However, departmental administrators, those with command authorization update or higher, do have the ability to assign forms to themselves.

Attachments

Once a request form is created attachments can be added. Attached files can be up to 20 MB.



The screenshot shows a light gray rectangular box representing the 'Attachments' section. At the top left, the word 'Attachments' is displayed in a bold, dark font. To its right is a blue button with the text 'Add Attachment' in white. Below these elements is a horizontal line, and underneath that line, the text 'No attachments have been uploaded.' is centered in a gray font.



The screenshot shows a 'Attach a File' dialog box with a white background and a dark gray border. The title bar at the top reads 'Attach a File' followed by a red asterisk and the text '* Indicates a required field.' in a smaller font. A close button (an 'X' in a circle) is in the top right corner. The main area contains three fields: 1) A required field labeled '* Select File' with a 'Browse' button and a note 'Files cannot be larger than 20 MB.' 2) A required field labeled '* Category' with a dropdown menu showing a downward arrow. 3) A field labeled 'Description' with a text area and upward/downward arrows. At the bottom right, there are two buttons: a dark gray 'Close' button and a blue 'Upload File' button.

To attach a file to a request form:

1. Click **Add Attachment**.
2. Click **Browse** and select the appropriate file.
3. Click the **Category** drop-down menu and select the appropriate category.
4. The Description field is optional. Type a description, if preferred.
5. Click **Upload File**.
6. Click **Close** to return to the form.

Copy

To copy a request:

1. Go to the request form to be copied.
2. Click the **Advanced Options** drop-down menu.
3. Select **Copy**.

All information from the original form copies over to the newly created form except for attachments. A form in any status can be copied, including forms that are created, in progress, declined, or finalized.

Decline

If someone to whom a request is assigned wishes to refuse the request for some reason, the request can be declined.

Declining the request means that no further changes can be made to the form.

If the request form simply requires additional information, it should not be declined; instead, it should be reassigned.

Travel Authorization Request: Decline

Request History Assign **Decline** Finalize

Assigned To	Sean D White (whitesd)	Created By	Sean D White (whitesd)
Assigned On	Nov. 18, 2013, 1:49 p.m.	Created On	Nov. 18, 2013, 10:57 a.m.
Request ID	REQ999937	Last Updated By	Sean D White (whitesd)
Request Type	Travel Authorization Request Form	Last Updated On	Nov. 18, 2013, 1:49 p.m.
Status	In Progress		
Requester	Sean D White (whitesd)		
Description	fdsa		
Request Notes			

** Indicates a required field.*

* Reason for Declining

Decline

A request can be declined in one of two ways:

1. Select **Save and Decline** from the drop-down menu of options on the request page
2. Click the **Decline** tab at the top of the request form page
3. The user will be required to enter a **Reason for Declining**
4. Click **Decline**

Once the request is declined, an email notification is sent to the person who created the request to let him/her know that the form was declined.

Once the request is declined, no further changes can be made.

Finalize

Once all the necessary information has been added to the request form and it has followed the departmental ad hoc approval process, the next step is to finalize it. Finalizing the request will either generate the associated electronic document (such as a *DEFINE VE5 for Travel Authorization Requests) or send an email notification to a particular

department (such as facilities Services) that additional steps are now required.

The screenshot displays a web interface for managing a request. At the top, there is a navigation bar with tabs: Request, History, Assign, Decline, and Finalize. The 'Finalize' tab is currently selected. Below the navigation bar, the request details are organized into two columns. The left column includes: Assigned To (Sean D White (whitesd)), Assigned On (Nov. 20, 2013, 4:35 p.m.), Request ID (REQ99993S), Request Type (Travel Authorization Request Form), Status (In Progress), Requester (Ashley A Adams (mooreaa1)), Description (test assign w/ new dynamic profiling), and Request Notes. The right column includes: Created By (Ashley A Adams (mooreaa1)), Created On (Nov. 20, 2013, 7:48 a.m.), Last Updated By (Sean D White (whitesd)), and Last Updated On (Nov. 25, 2013, 11:12 a.m.). Below the details, a red asterisk indicates a required field. The form fields include: Traveler (Ashley A Adams (mooreaa1)), Traveler Type (a dropdown menu), Fiscal Year (2013-2014, a dropdown menu), Creator Desk (DRAMA - DEFAULT DESK OF THE OFF, a dropdown menu), and Encumber Funds (a text field with a note: 'To enter account numbers and amounts, go to the Request tab.'). At the bottom left, another red asterisk indicates a required field. A blue 'Finalize' button is located at the bottom right of the form.

Assigned To	Sean D White (whitesd)	Created By	Ashley A Adams (mooreaa1)
Assigned On	Nov. 20, 2013, 4:35 p.m.	Created On	Nov. 20, 2013, 7:48 a.m.
Request ID	REQ99993S	Last Updated By	Sean D White (whitesd)
Request Type	Travel Authorization Request Form	Last Updated On	Nov. 25, 2013, 11:12 a.m.
Status	In Progress		
Requester	Ashley A Adams (mooreaa1)		
Description	test assign w/ new dynamic profiling		
Request Notes			

* Indicates a required field.

* Traveler Ashley A Adams (mooreaa1)

Traveler Type

* Fiscal Year 2013-2014

* Creator Desk DRAMA - DEFAULT DESK OF THE OFF

Encumber Funds To enter account numbers and amounts, go to the Request tab.

* Indicates a required field.

A request can be finalized in one of two ways:

1. Select **Save and Finalize** from the drop-down menu of options on the request page
2. Click the **Finalize** tab at the top of the request form page
3. The user may be required to enter additional information on the finalize page (this will vary depending on the type of request)
4. Click **Finalize**

For those requests that generate electronic documents, the finalize page is the only time when the user will be asked to select a Creator Desk.

Once the request is finalized, no further changes can be made.

History

The **History** tab displays the history of actions taken on a particular request form. Information on this page includes: what action was taken, by whom, and the date and time the action was taken.

Travel Authorization Request: History

Request

History

Assign

Decline

Finalize

Assigned To

Sean D White (whitesd)

Assigned On

April 23, 2013, 2:03 p.m.

Request ID

REQ99973D

Request Type

Travel Authorization Request Form

Status

In Progress

Requester

Sarah Greening (sng343)

Description

16

Request Notes

Created By

Sarah Greening (sng343)

Created On

April 12, 2013, 1:58 p.m.

Last Updated By

Sean D White (whitesd)

Last Updated On

April 23, 2013, 2:03 p.m.

Action	Action Taken By	Action Occurred On
Request created	Sarah Greening (sng343)	April 12, 2013, 1:58 p.m.
Assignment changed from Sarah Greening (sng343) to FAUX1 Group for testing (FAUX1)	Sarah Greening (sng343)	April 12, 2013, 1:59 p.m.
Status changed from Created to In Progress	Sarah Greening (sng343)	April 12, 2013, 1:59 p.m.
Assignment changed from FAUX1 Group for testing (FAUX1) to Sean D White (whitesd)	Sean D White (whitesd)	April 22, 2013, 3:49 p.m.
Assignment changed from Sean D White (whitesd) to Tracy DeMont (demonctl)	Sean D White (whitesd)	April 23, 2013, 2:03 p.m.
Assignment changed from Tracy DeMont (demonctl) to Sean D White (whitesd)	Sean D White (whitesd)	April 23, 2013, 2:03 p.m.

View Only

In addition to the updatable request form, there is an additional version of the request which is available to users who might not be directly connected with it but which still allows employees the ability to view information without making updates.

The View Only page will display to a user if the request was created on the user’s behalf.

Setting Up and Maintaining Groups

In the Request Form System, users can assign forms to groups for processing. Groups are set up in Apollo to authorize appropriate people from each department as group owners. Thereafter, each group's ownership and membership is maintained by the department's group owners.

To request group setup, send an email to askUS@austin.utexas.edu with the subject "Request Form Group Setup." Include the following information:

- Request form type
- Department's mainframe logon ID prefix, if known
- Group description
- UT EIDs of people authorized to maintain group
- Group members' position IDs or UT EIDs

Once group(s) have been set up, User Services will assist the department with profiling assignees for people in the department who will use the form(s).

For more information about how to create a new group or make changes to an existing one, refer to the [Group Setup and Maintenance](#) page in [Request Form System Help](#).

Training, Help, and Support

- Handouts, and other training materials:
<http://www.utexas.edu/business/accounting/et/training/training.php>
- Answers to frequently asked questions are available in askUS:
<https://austin-utexas.custhelp.com>
- Contact the User Services Help Line at 512-471-8802